Client Center: Navigating Through the Client Center

- **Product:** 360 Core Client Center

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How do I find my way around the Client Center?

Because there is so much in the Client Center, navigating through it can seem overwhelming. To help you get around in the Client Center, we've provided several navigation features that you need to understand in order to more effectively manage your data and products. Click the title to jump to that section on this page:

- [Client Center Home Page](#)
- [More Navigation Features](#), like bread crumbs, navigation trees, and so forth.

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**Client Center Home Page**

If you have more than one library profile, the first screen you see (after [logging in to the system](#)) prompts you to select a library.

Otherwise, the Client Center Home page is the first screen you see after [logging in to the system](#). It's the easiest place for you to begin all of your resource management activities, and includes direct access to the e-Catalog, all management and analysis tools available to your library, and information about Ex Libris and our services.

You can always return to the Home page by clicking **Home** on any other page in the Client Center.

The Home page is divided into three basic sections:

- **Page Header:** The top of the page contains some account navigation tools and the e-Catalog search form.
- **Left Sidebar:** The left side of the page contains information about Ex Libris, products, and news.
- **Management Tools:** The right side of the page has links to all of the primary resource and product management tools. From here, you're a click away from your most common tasks.

Below is an example of a typical Home page. You may not have all the different sections or functions shown in this example; the Home page changes depending on the Ex Libris services to which your library subscribes:
The areas with numbers in red circles are explained below:

1. **Top-Level Navigation**: Change your account password, get access to help or contact information for Ex Libris offices, or log out. Access other library profiles if you have them. (See Account Navigation below.)

2. **E-Catalog**: Search for a title, database, or provider using the e-Catalog (see Finding Resources With the e-Catalog).

3. **Double Bread-Crumb Navigation**: Navigate to previously accessed pages using the top-level navigation on each page, or use the second level bread-crumb navigation to go back up the resource hierarchy. (See Bread Crumbs below.)

4. **Products**: Click the names of your subscribed (green checks) and unsubscribed products for product overviews and examples.

5. **Management Tools**: Add and manage resources and information in your library’s Client Center profile.

6. **Data Summary**: View an overview of your total holdings and unique (de-duplicated) holdings in your subscribed databases.

7. **Data Management**: Manage your subscription resources (see below).

8. **Business Intelligence Tools**: Learn more about your resources and how your patrons use them.

9. **Administer Your Products**: Customize your subscribed products and manage your services.

10. **Manage Your Library**: Manage staff Client Center accounts, manage your library settings (such as your proxy, URLs, and so on), and track changes made in your profile. For a consortium, there is also a link to View Member Libraries.

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**More Navigation Features**

Besides the Client Center Home page, there are five primary navigation features available to help you move around within the Client Center.

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**Bread Crumbs**

Each page includes two "bread crumb" trails at the top that allow you to move one or more levels back (up) in the Client Center organizational hierarchy:
For example, if you are looking at the Holding Details page of the journal Accountancy in OCLC's ABI/INFORM database, the bread-crumbs would look like this:

**Home > Data Management > Holding Details**

OCLC :: ABI/INFORM :: Accountancy

Using the top bread-crumbs trail, you could navigate back to the Data Management home page or even the Client Center Home page with a single click. Using the bottom bread-crumbs trail, you could navigate to the ABI/INFORM Database Details page, or to the OCLC Provider Details page with a single click.

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**Note**

These links are tied to a specific hierarchy, not necessarily to how you arrived at the page.

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**Navigation Tree**

When you access any of the tools under "Manage Your Data," "Manage Your Products," and "Manage Your Library," you'll see a left-side navigation tree throughout the pages. While the bread crumb trail tracks your levels in the Client Center (the bigger navigation picture), the navigation tree tracks your levels within each tool. Use the hierarchy of links in the navigation tree to move to the specific pages you need to access:

**Home > Library Settings**

- Library Info
  - Library Settings
  - Library Info
  - Library URLs
  - Library/Institutional IPs
  - Other Settings
  - Serials Solutions Permissions

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**User Navigation Menu**

At the top of every page is a small navigation menu that provides you quick access to your account details, the **Log Out** link, and the Change link, which allows you to change your library profile if you have more than one.

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**Getting Support**

If you need assistance with the Client Center, please select from the following links, which appear in the User Navigation Menu at the top of every Client Center page:

- **Chat With Us** – This link takes you to Intota's Contact Support page. If an agent is available, select the **Chat With an Agent** button on the bottom of the page. Chat sessions are useful to resolve the following types of issues quickly:
  - Simple how-to questions and configurations
Behavior and general inquiries

Known issues

If our agents are not available or not in session, please try again later or try one of our other Support links.

- **Knowledge Center & Online Community** – This link takes you to the Ex Libris Knowledge Center, which contains our product documentation, knowledge articles, training videos, and so forth.

- **Submit A Case** – This link takes you directly to the Support Portal, where you can open a Support ticket to report a problem or request assistance.

E-Catalog

The e-Catalog also appears at the top of every page throughout the Client Center and provides a quick way to find a journal, book, database, or provider. This tool is described in more detail [here](#).

Data Management Home Page

The Data Management home page is the primary page used for managing your resources:

From this page, you can use the **Filter By** drop-down list to filter the databases using the following options: **Name Begins With**, **Provider**, or **Status Is**.

**Note**

The **Name Begins With** option filters by both the authoritative KB database name and the custom database name.